

Administrative Budget

FY 2008-09 Details of Formal Budget Requests

#	Division	Description of Request	Recommended		
			One-Time \$	Ongoing \$	PYs
1	CORE	One position to support core workload and management of the California Employers' Retiree Benefit Trust program activities (Constituent Relations Office)	\$0	\$88,000	1.0
2	ERSD	One position to support implementation of a centralized escalation process needed for coordination between employers, various units within ERSD and OFAS to close outstanding issues and to implement policy changes and procedures (Employer Services Division)	\$0	\$99,000	1.0
Actuarial & Employers Services Total			\$0	\$187,000	2.0
3	FCSD	Eight positions to establish the California Employers Retirement Benefit Trust Unit and the Health Program Unit to manage all fiscal aspects, to provide resources for the SIP functions and resolve audit findings identified by the internal and external auditors in the Fund and Retirement Accounting Section (Fiscal Services Division)	\$0	\$755,000	8.0
4	FCSD	Conversion of five Limited-Term Positions to Permanent will sustain the ability to address the workload increase due to the large number of partnerships established and the distribution and contribution audit findings in the Real Estate Unit (Fiscal Services Division)	\$0	\$232,000	0.0
5	HRSD	Four positions to support core workload increases in the Classification and Consultation Unit that provides consultation and guidance to managers; the Examination Services unit as the number of exam offerings continues to grow; and the Personnel Transaction Unit, processing all transactions for employee payroll, benefits, and attendance (Human Resources Division)	\$0	\$271,000	4.0
6	HRSD	One position to support and deliver the different activities in the Workforce Management & Leadership Program (Human Resources Division)	\$0	\$88,000	1.0
7	HRSD	One position to support for Pension System Resumption and Enterprise Transition Management projects, reviewing a high percentage of staff classifications and updating duty statements of all impacted staff (Human Resources Division)	\$0	\$88,000	1.0
8	HRSD	One position to provide support core workload growth in the Employee Relations & Medical Management Unit, processing claims regarding Workers Compensation, Family Medical Leave, Reasonable Accommodation and Catastrophic Leave (Human Resources Division)	\$0	\$69,000	1.0
9	HRSD	Five positions to develop and implement recruitment strategies and provide support to the hiring process in the Recruitment Services Unit (Human Resources Division)	\$0	\$392,000	5.0
10	HRSD	One position to provide management direction over the Employee Wellness & Recognition Programs, Interpretive Services, All Staff Training & Development, the Learning Center, Succession Planning, and other areas (Human Resources Division)	\$0	\$121,000	1.0
11	OSSD	Two positions to support core workload growth in the Contracts Management Section, and Policy & Administrative Section (Operations Support Services Division)	\$0	\$147,000	2.0
12	OSSD	Two positions to address core workload growth in the Procurement Section due to staff growth in the Enterprise and to reduce continuous backlogs (Operations Support Services Division)	\$0	\$175,000	2.0

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			One-Time \$	Ongoing \$	PYs
13	SMSD	One position and additional consultant funding to address the large increase in requests for strategic and leadership alignment services, and employee survey initiatives (Strategic Management Services Division)	\$0	\$238,000	1.0
14	SMSD	Two positions and additional consultant funding to address core workload growth and large increases in on-demand requests for performance and business management engagements (Strategic Management Services Division)	\$0	\$261,000	2.0
15	SMSD	Four positions for the Enterprise Transition Management (ETM) Initiative, enabling the ETM project and vendors to develop and implement the key deliverables including project plans, transition and communication plans, training plans, staff skills and change readiness assessments, and an organizational development plan (Strategic Management Services Division)	\$0	\$321,000	4.0
Administrative Services Total			\$0	\$3,158,000	32.0
16	CDOP	Ongoing Operational Funding to support investment diversity efforts by coordinating external initiatives and partnering with Investment staff in their outreach efforts (CalPERS Diversity Outreach Program)	\$0	\$100,000	0.0
17	EXEO	One additional position and consulting services to permanently establish the Privacy Protection & Security Task Force due to the inadvertent data security breach that occurred in August 2007. (Executive Office)	\$0	\$193,000	1.0
Executive Total			\$0	\$293,000	1.0
18	ISOF	Convert one Blanket Position to Permanent to provide support to existing functions utilizing Information Security Office (ISOF) funding (Information Security Office)	\$0	\$0	1.0
19	LEGO	Two positions in the Legal Office, assisting the investigative functions involving disability retirement matters and the conversion of one limited-term position aiding in the recruitment and retention of experienced attorneys (Legal Office)	\$0	\$92,000	2.0
20	OFAS	Two positions to audit all high-risk public agencies within a 3-year-cycle per the Finance Committee's direction (Office of Audit Services)	\$0	\$205,000	2.0
General Counsel Total			\$0	\$297,000	5.0
21	EMHS	One position to support consolidation and expansion of the Public Agency Billing and Complementary Annuitant Premium Program units into one (Employer Member Health Services)	\$0	\$88,000	1.0
22	EMHS	One position to support core workload increases needed to process health benefit enrollments and to provide assistance to retirees and families for State schools, public agencies and California State University system programs (Employer Member Health Services)	\$0	\$69,000	1.0
23	EMHS	One position to provide support in the Communication and Education Unit to meet mandatory education and communications requirements for CalPERS members, employers and staff (Employer Member Health Services)	\$0	\$88,000	1.0
24	HPPS	Two positions to support development and operations of the Medicare Part D subsidy distribution and implementation of the Voluntary Data Sharing Agreement (Health Policy and Program Support)	\$0	\$150,000	2.0
Health Benefits Total			\$0	\$395,000	5.0

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			One-Time \$	Ongoing \$	PYs
25	ISD	One-year extension of eight limited-term positions to support project management, business engineering, technical performance and load testing, release coordination and web based activities (Innovative Services Division)*	\$820,000	\$0	0.0
26	ITSB	Conversion of six ITSB consultants into seven permanent CalPERS staff identified in ITSB's 5 Year Consultant Conversion Plan (Information Technology Services Branch)	\$0	\$0	7.0
27	TSSD	Three positions to centrally manage applications and rapidly deploy patches and upgrades using Radia and to provide critical desktop support for personal digital assistants (PDAs) (Information Technology Services Branch)	\$0	\$308,000	3.0
28	TSSD	One-year extension of four limited-term positions to continue to support critical web based objectives and initiatives, such as myCalPERS , Customer Service Experience, governance process enhancements and the State Alternate Retirement Program (Technology Services and Support Division)*	\$0	\$0	0.0
Information Technology Services Total			\$820,000	\$308,000	10.0

* These positions have already been accounted for in previous FBRs and are in the base, they are not new positions, and are due to expire in 08/09.

29	INVO	Four positions, funded by a \$454,000 ongoing reduction in the Spring-Fed Pool, to implement the Alternative Investment Management 2005 Strategic Review (Investment Office)	\$0	\$0	4.0
30	INVO	Two positions to implement Phase 2 of the new Inflation-Linked Asset Class and \$200,000 for consultants to work with staff to establish and implement the Infrastructure and Forestland Programs (Investment Office)	\$0	\$478,000	2.0
31	INVO	One position to implement Phase 2 of the Strategic Plan for the Real Estate Unit approved by the Investment Committee on September 10, 2007 (Investment Office)	\$0	\$111,000	1.0
32	INVO	One position to support the expanded role and responsibilities of the Chief Operating Investment Officer and the growth of the Performance Monitoring, Portfolio Reporting, Trade Settlement, Business Services, and Technology functions (Investment Office)	\$0	\$156,000	1.0
33	INVO	One position to support the Internal Equity group's efforts to develop additional value-added strategies, execute additional quantitative research, and manage a greater number of internal portfolios (Investment Office)	\$0	\$219,000	1.0
Investment Office Total			\$0	\$964,000	9.0

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34	CSED	Four positions, supported by redirected funds, to support and manage member education development and maintenance efforts, education marketing, and administration functions required of the Customer Education Center, and develop financial planning education as the division transitions financial planning education from external consultants to Regional Office staff (Customer Service & Education Division)	\$0	\$0	4.0
35	CSED	Two positions to increase levels of call monitoring and coaching to a degree more in alignment with call center quality assurance (QA) industry standards. Staff will also facilitate implementation of recommendations for enhancement of the QA Program (Customer Service & Education Division)	\$0	\$177,000	2.0
36	CSED	One position to analyze data from the Customer Contact Center to provide trend analysis and recommendations for future staffing requirements, system enhancements, and training opportunities. Staff will also facilitate coordination of system licenses, maintenance, and possible enhancements to improve customer service satisfaction levels (Customer Service & Education Division)	\$0	\$88,000	1.0
37	CSED	11 positions to increase staff in Regional Offices due to workload needs and the increased number of active members and retirees who require services and \$218,000 for one-time costs (\$82,000 ongoing) for tenant improvements to facilities due to expansion (Customer Service & Education Division)	\$218,000	\$1,131,000	11.0
38	MBSD	Two positions to establish and maintain the Alternative Retirement Program (ARP) election and funds transfer process; these positions are required to process ARP election forms, and post the appropriate service credit and member contributions to members' accounts for those who elect to transfer their ARP funds from DPA to CalPERS per Government Code §20908(a) and (b) (Member Services Division)	\$0	\$138,000	2.0
Member and Benefit Services Total			\$218,000	\$1,534,000	20.0
39	PAOF	Funding of \$100,000 to establish a vendor pool that will provide CalPERS access to specialized experts related to Web/Internet usability testing and user experience design (Public Affairs Office)	\$0	\$100,000	0.0
40	PAOF	One position to effectively support media and communication activities in the areas of Investments and Corporate Governance (Public Affairs Office)	\$0	\$88,000	1.0
41	PAOF	One-time funding of \$50,000 to replace outdated video production equipment, a video camera, DVD printer, and Macintosh laptop (Public Affairs Office)	\$50,000	\$0	0.0
42	PAOF	Funding of \$350,000 to increase the printing line item due to the Department of General Services mandate to utilize the Office of State Publishing (OSP) in lieu of a low-bid process and an increase in paper costs (Public Affairs Office)	\$0	\$350,000	0.0
Office of Public Affairs Total			\$50,000	\$538,000	1.0
TOTAL 2008-09 ADMINISTRATIVE BUDGET			\$1,088,000	\$7,674,000	85.0
TOTAL ONE-TIME + ONGOING			\$8,762,000		